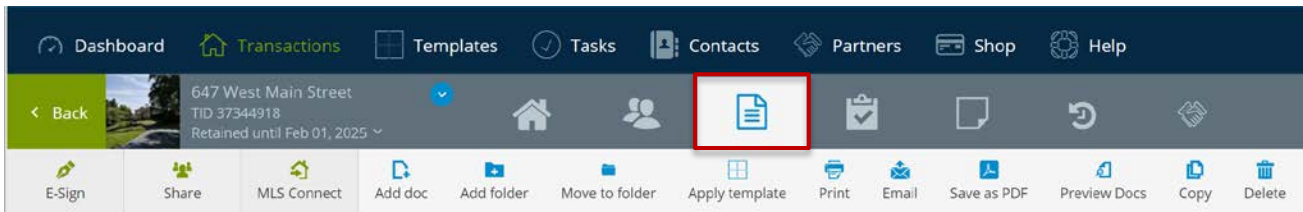




zipTMS® Toolbar Directory

A Reference Guide for zipForm® Plus Toolbars

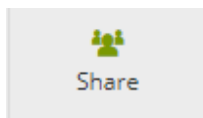
Documents Toolbar:



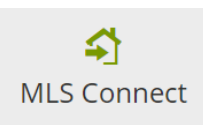
e-Sign: Send forms or documents for signatures using the e-Sign service of your choice (select zipLogix Digital Ink® or DocuSign® in your Profile Settings).



Share Feature: With zipCommunity™, you can share forms and documents online with anyone while tracking editing and viewing history.



MLS Connect: If your MLS participates with zipForm®, you can import listing data within zipForm® Plus.





Add Document: Upload a document to store it online with this transaction file.



Add doc

Add Folder: Add photos, flyers, feature sheets, and more to a folder within your transaction. This allows you to keep all your transaction items organized.



Add folder

Apply Template: Add a saved standard set of forms, folders, documents, tasks, and contacts. Create your own from the TEMPLATES page.



Apply template

Save as PDF: Save a form as a PDF in this file or to your desktop in order to preserve a copy of this form in its current state. Send Email or fax documents and forms (as PDFs) to anyone – no special equipment or accounts required.



Save as PDF

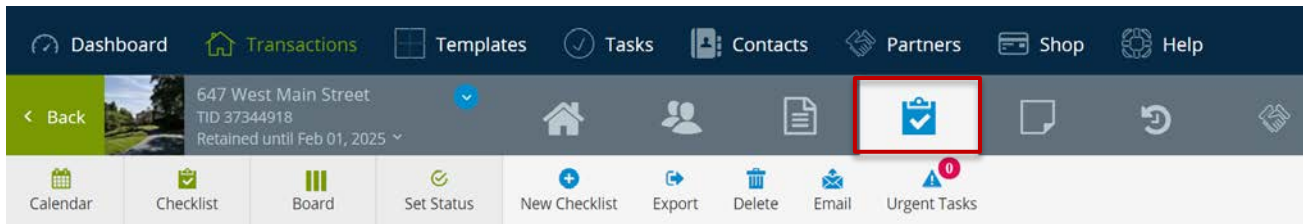
Copy PDF: Copy a PDF document from this file to another transaction file.



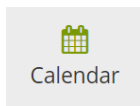
Copy



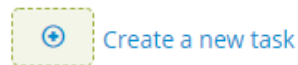
Tasks and Checklist Toolbars:



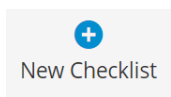
View Calendar: Switch to a calendar view of tasks according to due date.



New Task: Add a task, event, or reminder for yourself when viewing a checklist inside a Transaction.



New Checklist: Label a new checklist (a set of categories and tasks).



New Category: Create a new category for tasks in this file. Categories may be color-coded for easy identification.

Edit Category

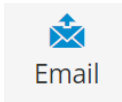
Checklist

Category

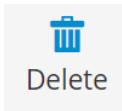
Select Color



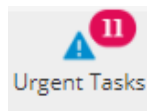
Email: Send a PDF of the checklist as an email attachment to a person of your choosing.



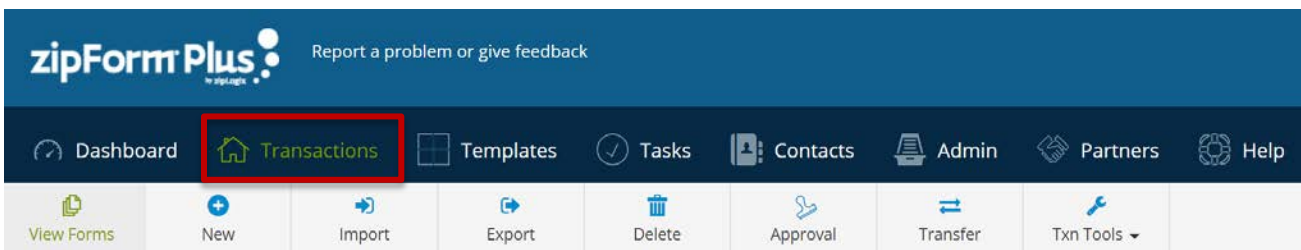
Delete: Select individual items, such as tasks or categories, in order to delete them.



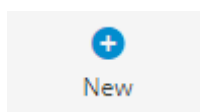
Urgent Tasks: View all of your tasks soon to be due or past due.



Transactions Toolbar:

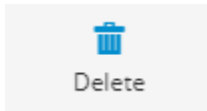


New: Start a new Transaction file (New Listing, New Purchase or Offer, New Lease, or New Lease-Listing).

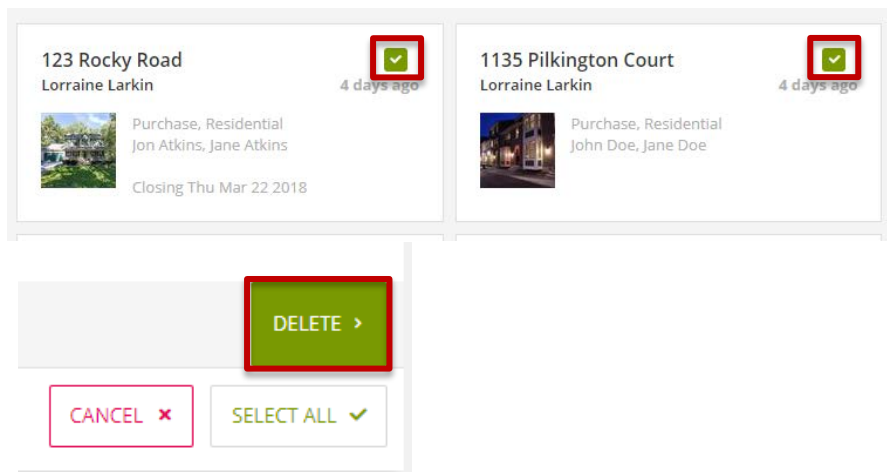




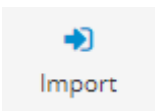
Delete: Select Transaction files to delete. Please note, deleting a file from the Transactions List will delete the forms, documents, and links to zipLogix Digital Ink® signed documents for this file.



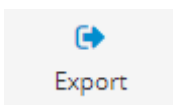
After clicking delete, you will be prompted to select files to delete. Delete by clicking the Delete button. Click Cancel to exit the delete screen and return to the main Transactions List options.



Import: Import a downloaded file to your transaction files in zipForm® Plus.

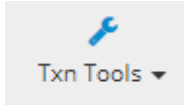


Export: Select files to download to your computer, saving them offline for backup or archives.







Transaction Tools:



- Create pre-written clauses to add to your forms with the **Clause Manager**
- Edit and modify saved information keyed into forms with the **Lookup Field Manager**.
- Calculate rates or payments and download an amortization table for fixed rate loans with the **Mortgage Calculator**.

 Clause Manager

 Lookup Field Manager

 Mortgage Calculator

Thank you for using zipForm® Plus!

